

# PHA Plans

## Streamlined 5-Year/Annual Version

U.S. Department of Housing and  
Urban Development  
Office of Public and Indian Housing

OMB No. 2577-0226  
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This information collection is authorized by Section 511 of the Quality Housing and Work Responsibility Act, which added a new section 5A to the U.S. Housing Act of 1937 that introduced 5-year and annual PHA Plans. The full PHA plan provides a ready source for interested parties to locate basic PHA policies, rules, and requirements concerning the PHA's operations, programs, and services, and informs HUD, families served by the PHA, and members of the public of the PHA's mission and strategies for serving the needs of low-income and very low-income families. This form allows eligible PHAs to make a streamlined annual Plan submission to HUD consistent with HUD's efforts to provide regulatory relief to certain PHAs. Public reporting burden for this information collection is estimated to average 11.7 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. HUD may not collect this information and respondents are not required to complete this form, unless it displays a currently valid OMB Control Number.

**Privacy Act Notice.** The United States Department of Housing and Urban Development, Federal Housing Administration, is authorized to solicit the information requested in this form by virtue of Title 12, U.S. Code, Section 1701 et seq., and regulations promulgated thereunder at Title 12, Code of Federal Regulations. Information in PHA plans is publicly available.

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## Streamlined 5-Year Plan for Fiscal Years 2005- 2009

## Streamlined Annual Plan for Fiscal Year 2004

**NOTE:** This PHA Plan template (HUD-50075-SA) is to be completed in accordance with instructions contained in previous Notices PIH 99-33 (HA), 99-51 (HA), 2000-22 (HA), 2000-36 (HA), 2000-43 (HA), 2001-4 (HA), 2001-26 (HA), 2003-7 (HA), and any related notices HUD may subsequently issue. Full reporting for each component listed in the streamlined Annual Plan submitted with the 5-year plan is required.

## Streamlined Five-Year PHA Plan

### Agency Identification

**PHA Name:** Whitefish Housing Authority **PHA Number:** MT015

**PHA Fiscal Year Beginning:** 07/2004

#### PHA Programs Administered:

☐ **Public Housing and Section 8**

Number of public housing units:

Number of S8 units:

☐ **Section 8 Only**

Number of S8 units:

☒ **Public Housing Only**

Number of public housing units:

☐ **PHA Consortia:** (check box if submitting a joint PHA Plan and complete table)

| Participating PHAs   | PHA Code | Program(s) Included in the Consortium | Programs Not in the Consortium | # of Units Each Program |
|----------------------|----------|---------------------------------------|--------------------------------|-------------------------|
| Participating PHA 1: |          |                                       |                                |                         |
| Participating PHA 2: |          |                                       |                                |                         |
| Participating PHA 3: |          |                                       |                                |                         |

#### Public Access to Information

**Information regarding any activities outlined in this plan can be obtained by contacting:**  
(select all that apply)

- ☒ Main administrative office of the PHA
- ☐ PHA development management offices
- ☐ PHA local offices

#### Display Locations For PHA Plans and Supporting Documents

The PHA Plans and attachments (if any) are available for public inspection at: (select all that apply)

- ☒ Main administrative office of the PHA
- ☐ PHA development management offices
- ☐ PHA local offices
- ☐ Main administrative office of the local government
- ☐ Main administrative office of the County government
- ☐ Main administrative office of the State government
- ☐ Public library
- ☐ PHA website
- ☐ Other (list below)

PHA Plan Supporting Documents are available for inspection at: (select all that apply)

- ☒ Main business office of the PHA
- ☐ PHA development management offices
- ☐ Other (list below)

## Streamlined Five-Year PHA Plan

PHA FISCAL YEARS 20\_\_ - 20\_\_

[24 CFR Part 903.12]

### A. Mission

State the PHA's mission for serving the needs of low-income, very low income, and extremely low-income families in the PHA's jurisdiction. (select one of the choices below)

- ☒ The mission of the PHA is the same as that of the Department of Housing and Urban Development: To promote adequate and affordable housing, economic opportunity and a suitable living environment free from discrimination.
- ☐ The PHA's mission is: (state mission here)

### B. Goals

The goals and objectives listed below are derived from HUD's strategic Goals and Objectives and those emphasized in recent legislation. PHAs may select any of these goals and objectives as their own, or identify other goals and/or objectives. Whether selecting the HUD-suggested objectives or their own, **PHAs ARE STRONGLY ENCOURAGED TO IDENTIFY QUANTIFIABLE MEASURES OF SUCCESS IN REACHING THEIR OBJECTIVES OVER THE COURSE OF THE 5 YEARS.** (Quantifiable measures would include targets such as: numbers of families served or PHAS scores achieved.) PHAs should identify these measures in the spaces to the right of or below the stated objectives.

#### HUD Strategic Goal: Increase the availability of decent, safe, and affordable housing.

- ☒ PHA Goal: Expand the supply of assisted housing  
Objectives:
- ☐ Apply for additional rental vouchers:
  - ☒ Reduce public housing vacancies: Maintain 98% occupancy
  - ☒ Leverage private or other public funds to create additional housing opportunities:  
Create 14-20 additional special needs rental units in Whitefish/ case management
  - ☒ Acquire or build units or developments
  - ☒ Other:
    - Aid 8-10 households gain home ownership per year
    - Increase staff to accommodate growth in WHA activities
    - Improve WHA computer systems
    - Develop a long term renovation / maintenance plan for the Mountain View Manorto ensure the best use of funds over the next 5-10 years.
- ☒ PHA Goal: Improve the quality of assisted housing  
Objectives:
- ☒ Improve public housing management: (PHAS score) 98 or better
  - ☐ Improve voucher management: (SEMAP score)
  - ☒ Increase customer satisfaction:
  - ☒ Concentrate on efforts to improve specific management functions:

(list; e.g., public housing finance; voucher unit inspections)

-Public Housing finance

- ☒ Renovate or modernize public housing units:
  - Air conditioning to Mountain View Manor
  - Modernization: End of hallways remodeled as sitting areas/atriums
  - Modernize: Create an outside smoking area
  - Modernize: Create "smoking wing"
  - Remodel kitchens to include better ovens, hoods, ventilation, energy use
  - Increase ventilation in rooms through replacement of bathroom fans, hoods
  - Create additional office space
  - Convert an apartment to case management offices/ PHA offices
  - Increase / Improve parking areas
  - Modernize apartments to include private outside entrances / patios on ground floor apartments
  - Replace community space window coverings for energy efficiency
  - Complete water conservation renovation / low flush toilet and faucet change out
- ☐ Demolish or dispose of obsolete public housing:
- ☐ Provide replacement public housing:
- ☐ Provide replacement vouchers:
- ☒ Other: Create computer lab for residents

☒ PHA Goal: Increase assisted housing choices

Objectives:

- ☐ Provide voucher mobility counseling:
- ☒ Conduct outreach efforts to potential voucher landlords
- ☐ Increase voucher payment standards
- ☒ Implement voucher homeownership program:
- ☒ Implement public housing or other homeownership programs: Program to aid public housing tenants save for down payment / Homebuyer Education courses
- ☐ Implement public housing site-based waiting lists:
- ☐ Convert public housing to vouchers:
- ☒ Other: Obtain Section 8 rental voucher program at WHA

**HUD Strategic Goal: Improve community quality of life and economic vitality**

☒ PHA Goal: Provide an improved living environment

Objectives:

- ☒ Implement measures to de-concentrate poverty by bringing higher income public housing households into lower income developments:
  - Support City efforts to promote the use of inclusionary zoning ordinance to include 10% affordable rentals as well as ownership opportunities for low-income households.
  - Maintain policy of income limits upon move in only
- ☒ Implement measures to promote income mixing in public housing by assuring

- access for lower income families into higher income developments:
  - Vouchers and use of inclusionary zoning ordinance for rentals and ownership
- ☒ Implement public housing security improvements:
  - Security Cameras,
  - Resident Monitor/Manager,
  - Police patrol at night on pedestrian path,
  - Improve signage that this is Senior living area
  - Other.
- ☒ Designate developments or buildings for particular resident groups (elderly, persons with disabilities)
  - Designate wing as assisted living / live in staff
  - Create new units on HA property for homeless, disabled, those in need of more privacy and/or quiet
- ☒ Other: (list below)
  - Create additional gardens, community gardens, greenhouse,
  - Address difficulty of Seniors/disabled to get to lunch and services at nearby Senior Center. / acquire golf cart to transport tenants to lunch at Senior Center,
  - Improve relations with Senior Center for services and classes,
  - Acquire adjacent City owned land / including Senior Center
  - Encourage an increase health care education courses at Manor,
  - Addition of bike path through property, fishing access, outside activities
  - Encourage an increase in tenant participation in outside activities,
  - Encourage and support Senior Theatre,
  - Encourage increased bus service to all assisted elderly/disabled apartments
  - Encourage services/relations with all Senior/Disabled across community
  - Continue and expand computer use for tenants

**HUD Strategic Goal: Promote self-sufficiency and asset development of families and individuals**

- ☒ PHA Goal: Promote self-sufficiency and asset development of assisted households
  - Objectives:
    - ☒ Increase the number and percentage of employed persons in assisted families:
      - Network for services with Job Service / homeless shelter programs
      - Outreach with local employers
      - Create jobs for tenants at HA
    - ☒ Provide or attract supportive services to improve assistance recipients' employability:
    - ☒ Provide or attract supportive services to increase independence for the elderly or families with disabilities.
    - ☒ Other: (list below)
      - Offer financial education courses,

## HUD Strategic Goal: Ensure Equal Opportunity in Housing for all Americans

- ☒ PHA Goal: Ensure equal opportunity and affirmatively further fair housing  
Objectives:
- ☒ Undertake affirmative measures to ensure access to assisted housing regardless of race, color, religion national origin, sex, familial status, and disability:
  - ☒ Undertake affirmative measures to provide a suitable living environment for families living in assisted housing, regardless of race, color, religion national origin, sex, familial status, and disability:
  - ☒ Undertake affirmative measures to ensure accessible housing to persons with all varieties of disabilities regardless of unit size required:
    - Increase number of accessible entrances to building / eliminate all steps in sidewalks
    - Remodel office to accommodate wheelchair/walker entrance and use of desk
    - Create ADA sidewalk to Senior Center
    - Create ADA accessible garden area
    - Support ADA bike/pedestrian bath crossing HA land and connecting HA to public parks
    - Increase supply, improve quality of HA owned wheelchairs / walkers
    - Additional furniture suitable to disabilities
    - Modernize exercise room
    - Create Additional handicapped parking spaces including new sidewalks/pavement
    - Promote accessible features in new construction projects / private for profit
    - Modernize front entrance for easier bus loading, drop off/ pick up
    - Rehabilitate rain gutters to ensure proper drainage / stop ice build up in walking areas.
  - ☒ Other: (list below)
    - Additional covered parking
    - Move main Housing Authority office out of                      apartment complex and into a more visible and accessible location.

### Other PHA Goals and Objectives: (list below)

- Acquire existing rental units including current for profit and preservation units
- Expand maintenance to other WHA properties / assisted units for contract
- Move main PHA office to outside location
- Aid low and moderate income persons, seniors and disabled persons find housing.
  - Increase WHA staff in order to be able to offer more services
  - Obtain CDBG, HOME, and other federal and state grants for the purpose of increasing affordable housing opportunities within the PHA jurisdiction.
  - Encourage and support additional public transportation
  - Purchase City properties for the purpose of expanding affordable housing and services to low income, disabled and senior residents. This includes the purchase

of the adjacent lands, Golden Agers Senior Center, and other City owned properties.  
-Continue collaborative efforts with City of Whitefish in the area of housing needs.

## **Streamlined Annual PHA Plan**

### **PHA Fiscal Year 2004**

[24 CFR Part 903.12(b)]

### **Table of Contents**

Provide the following table of contents for the streamlined Annual Plan submitted with the Five-Year Plan, including all streamlined plan components, and additional requirements, together with the list of supporting documents available for public inspection.

#### **A. ANNUAL STREAMLINED PHA PLAN COMPONENTS**

- |                                     |  |
|-------------------------------------|--|
| <input checked="" type="checkbox"/> | 1. Housing Needs (2004 Housing Plan and Market Analysis)   |
| <input checked="" type="checkbox"/> | 2. Financial Resources   |
| <input checked="" type="checkbox"/> | 3. Policies on Eligibility, Selection and Admissions   |
| <input checked="" type="checkbox"/> | 4. Rent Determination Policies   |
| <input checked="" type="checkbox"/> | 5. Capital Improvements Needs  |
| <input type="checkbox"/>            | 6. Demolition and Disposition  |
| <input checked="" type="checkbox"/> | 7. Homeownership   |
| <input checked="" type="checkbox"/> | 8. Civil Rights Certifications (included with PHA Certifications of Compliance)  |
| <input checked="" type="checkbox"/> | 9. Additional Information  |
|                                     | a. PHA Progress on Meeting 5-Year Mission and Goals  |
|                                     | b. Criteria for Substantial Deviations and Significant Amendments  |
|                                     | c. Other Information Requested by HUD  |
|                                     | i. Resident Advisory Board Membership and Consultation Process   |
|                                     | ii. Resident Membership on the PHA Governing Board   |
|                                     | iii. PHA Statement of Consistency with Consolidated Plan   |
|                                     | iv. (Reserved)   |
| <input type="checkbox"/>            | 10. Project-Based Voucher Program  |
| <input type="checkbox"/>            | 11. Supporting Documents Available for Review  |
| <input checked="" type="checkbox"/> | 12. FY 2003 Capital Fund Program and Capital Fund Program Replacement Housing Factor, Annual Statement/Performance and Evaluation Report |
| <input checked="" type="checkbox"/> | 13. Capital Fund Program 5-Year Action Plan  |
| <input checked="" type="checkbox"/> | 14. Other (List below, providing name for each item)   |
|                                     | -Whitefish Housing Needs Assessment  |

## B. SEPARATE HARD COPY SUBMISSIONS TO LOCAL HUD FIELD OFFICE

**Form HUD-50077**, PHA Certifications of Compliance with the PHA Plans and Related Regulations: Board Resolution to Accompany the Standard Annual, Standard Five-Year, and Streamlined Five-Year/Annual Plans;

Certification by State or Local Official of PHA Plan Consistency with Consolidated Plan.

For PHAs APPLYING FOR CAPITAL FUND PROGRAM (CFP) GRANTS:

**Form HUD-50070**, Certification for a Drug-Free Workplace;

**Form HUD-50071**, Certification of Payments to Influence Federal Transactions;

**Form SF-LLL & SF-LLLa**, Disclosure of Lobbying Activities.

### **Executive Summary (optional)**

[903.7(r)]. If desired, provide a brief overview of the contents of the streamlined 5-Year/Annual Plan.

Over the next five years, the Whitefish Housing Authority will increase its activities in the creation and management of affordable housing opportunities in the city of Whitefish and the outlying areas. The Whitefish Housing Authority will maintain a PHA score of 98 or better in the management and services of the Mountain View Manor, 50-units for the elderly and disabled. The Whitefish Housing Authority plans the expansion of services to the tenants, including but not limited to continued modernization of apartments and common spaces, expanded tenant services and transportation, and increased accessibility of the buildings and grounds. Within the next five years, the Housing Authority will create new housing programs with the goal of increasing home ownership opportunities for low and very low income groups, create programs to house those with special needs, operate a Section 8 voucher program, and network with established agencies for the provision of services for the disabled.

The Whitefish Housing Authority plans to be the contact center for the community in the area of housing.

## **1. Statement of Housing Needs** [24 CFR Part 903.12 (b), 903.7(a)]

### **A. Housing Needs of Families on the Public Housing and Section 8 Tenant- Based Assistance Waiting Lists**

State the housing needs of the families on the PHA's waiting list/s. **Complete one table for each type of PHA-wide waiting list administered by the PHA.** PHAs may provide separate tables for site-based or sub-jurisdictional public housing waiting lists at their option.

| Housing Needs of Families on the PHA's Waiting Lists   |               |                     |                 |
|--|---------------|---------------------|-----------------|
| Waiting list type: (select one)  |               |                     |                 |
| <input type="checkbox"/> Section 8 tenant-based assistance                                       |               |                     |                 |
| <input checked="" type="checkbox"/> Public Housing   |               |                     |                 |
| <input type="checkbox"/> Combined Section 8 and Public Housing                                   |               |                     |                 |
| <input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional) |               |                     |                 |
| If used, identify which development/subjurisdiction:   |               |                     |                 |
|  | # of families | % of total families | Annual Turnover |
| Waiting list total   | 10            |                     | 6               |
| Extremely low income<br><=30% AMI  | 5             | 50%                 |                 |



| Housing Needs of Families on the PHA's Waiting Lists   |    |     |  |
|--|----|-----|--|
| Very low income<br>(>30% but <=50% AMI)  | 3  | 30% |  |
| Low income<br>(>50% but <80% AMI)  | 2  | 20% |  |
| Families with children   | 0  | 0   |  |
| Elderly families   | 6  | 60% |  |
| Families with Disabilities   | 5  | 50% |  |
| Race/ethnicity   |    |     |  |
| Race/ethnicity   |    |     |  |
| Race/ethnicity   |    |     |  |
| Race/ethnicity   |    |     |  |
| Characteristics by Bedroom Size (Public Housing Only)  |    |     |  |
| 1BR  | 10 |     |  |
| 2 BR   |    |     |  |
| 3 BR   |    |     |  |
| 4 BR   |    |     |  |
| 5 BR   |    |     |  |
| 5+ BR  |    |     |  |
| Is the waiting list closed (select one)? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes<br>If yes:<br>How long has it been closed (# of months)?<br>Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input type="checkbox"/> Yes<br>Does the PHA permit specific categories of families onto the waiting list, even if generally closed?<br><input type="checkbox"/> No <input type="checkbox"/> Yes |    |     |  |

## B. Strategy for Addressing Needs

Provide a brief description of the PHA's strategy for addressing the housing needs of families on the PHA's public housing and Section 8 waiting lists **IN THE UPCOMING YEAR**, and the Agency's reasons for choosing this strategy.

In the upcoming year the Whitefish Housing Authority will investigate the ability of the Housing Authority to create more units at the Mountain View Manor. The Housing Authority will continue to work closely with other housing agencies to place families on the waiting list.

### (1) Strategies

**Need: Shortage of affordable housing for all eligible populations**

**Strategy 1. Maximize the number of affordable units available to the PHA within its current resources by:**

Select all that apply

- ☒ Employ effective maintenance and management policies to minimize the number of public housing units off-line
- ☒ Reduce turnover time for vacated public housing units
- ☒ Reduce time to renovate public housing units
- ☒ Seek replacement of public housing units lost to the inventory through mixed finance

- development
- ☒ Seek replacement of public housing units lost to the inventory through section 8 replacement housing resources
- ☐ Maintain or increase section 8 lease-up rates by establishing payment standards that will enable families to rent throughout the jurisdiction
- ☒ Undertake measures to ensure access to affordable housing among families assisted by the PHA, regardless of unit size required
- ☒ Maintain or increase section 8 lease-up rates by marketing the program to owners, particularly those outside of areas of minority and poverty concentration
- ☒ Maintain or increase section 8 lease-up rates by effectively screening Section 8 applicants to increase owner acceptance of program
- ☒ Participate in the Consolidated Plan development process to ensure coordination with broader community strategies
- ☐ Other (list below)

**Strategy 2: Increase the number of affordable housing units by:**

Select all that apply

- ☒ Apply for additional section 8 units should they become available
- ☒ Leverage affordable housing resources in the community through the creation of mixed - finance housing
- ☒ Pursue housing resources other than public housing or Section 8 tenant-based assistance.
- ☒ Other: (list below)  
-Working with the City for the adoption of an inclusionary zoning ordinance, affordable housing zoning, density increases, reduction of city fees when building affordable units.

**Need: Specific Family Types: Families at or below 30% of median**

**Strategy 1: Target available assistance to families at or below 30 % of AMI**

Select all that apply

- ☒ Exceed HUD federal targeting requirements for families at or below 30% of AMI in public housing
- ☒ Exceed HUD federal targeting requirements for families at or below 30% of AMI in tenant-based section 8 assistance
- ☒ Employ admissions preferences aimed at families with economic hardships
- ☒ Adopt rent policies to support and encourage work
- ☐ Other: (list below)

**Need: Specific Family Types: Families at or below 50% of median**

**Strategy 1: Target available assistance to families at or below 50% of AMI**

Select all that apply

- ☒ Employ admissions preferences aimed at families who are working

- ☒ Adopt rent policies to support and encourage work  
☐ Other: (list below)

**Need: Specific Family Types: The Elderly**

**Strategy 1: Target available assistance to the elderly:**

Select all that apply

- ☒ Seek designation of public housing for the elderly  
☒ Apply for special-purpose vouchers targeted to the elderly, should they become available  
☒ Other: (list below)  
Designate wings for the elderly that are free from smokers.

**Need: Specific Family Types: Families with Disabilities**

**Strategy 1: Target available assistance to Families with Disabilities:**

Select all that apply

- ☒ Seek designation of public housing for families with disabilities  
☒ Carry out the modifications needed in public housing based on the section 504 Needs Assessment for Public Housing  
☒ Apply for special-purpose vouchers targeted to families with disabilities, should they become available  
☒ Affirmatively market to local non-profit agencies that assist families with disabilities  
☐ Other: (list below)

**Need: Specific Family Types: Races or ethnicities with disproportionate housing needs**

**Strategy 1: Increase awareness of PHA resources among families of races and ethnicities with disproportionate needs:**

Select if applicable

- ☒ Affirmatively market to races/ethnicities shown to have disproportionate housing needs  
☐ Other: (list below)

**Strategy 2: Conduct activities to affirmatively further fair housing**

Select all that apply

- ☐ Counsel section 8 tenants as to location of units outside of areas of poverty or minority concentration and assist them to locate those units  
☐ Market the section 8 program to owners outside of areas of poverty /minority concentrations  
☐ Other: (list below)

**Other Housing Needs & Strategies: (list needs and strategies below)**

## **(2) Reasons for Selecting Strategies**

Of the factors listed below, select all that influenced the PHA's selection of the strategies it will pursue:

- ☐ Funding constraints
- ☒ Staffing constraints
- ☒ Limited availability of sites for assisted housing
- ☒ Extent to which particular housing needs are met by other organizations in the community
- ☐ Evidence of housing needs as demonstrated in the Consolidated Plan and other information available to the PHA
- ☐ Influence of the housing market on PHA programs
- ☒ Community priorities regarding housing assistance
- ☐ Results of consultation with local or state government
- ☒ Results of consultation with residents and the Resident Advisory Board
- ☒ Results of consultation with advocacy groups
- ☐ Other: (list below)

## **2. Statement of Financial Resources**

[24 CFR Part 903.12 (b), 903.7 (c)]

List on the following table the financial resources that are anticipated to be available to the PHA for the support of Federal public housing and tenant based Section 8 assistance programs administered by the PHA during the Plan year. Note: the table assumes that Federal public housing or tenant based Section 8 assistance grant funds are expended on eligible purposes; therefore, uses of these funds need not be stated. For other funds, indicate the use for those funds as one of the following categories: public housing operations, public housing capital improvements, public housing safety/security, public housing supportive services, Section 8 tenant-based assistance, Section 8 supportive services or other.

| <b>Financial Resources:<br/>Planned Sources and Uses</b>                  |                   |  |
|---|-------------------|--|
| <b>Sources</b>  | <b>Planned \$</b> | <b>Planned Uses</b>  |
| <b>1. Federal Grants (FY 2004 grants)</b>                                 |                   |  |
| a) Public Housing Operating Fund  | 69,000            |  |
| b) Public Housing Capital Fund  | 80,000            |  |
| c) HOPE VI Revitalization   | n/a               |  |
| d) HOPE VI Demolition   | n/a               |  |
| e) Annual Contributions for Section 8 Tenant-Based Assistance             | n/a               |  |
| f) Resident Opportunity and Self-Sufficiency Grants                       | n/a               |  |
| g) Community Development Block Grant                                      | 500,000           | Admin, home ownership / rental new units                   |
| h) HOME   | 500,000           | Public housing supportive services, home ownership program |
| Other Federal Grants (list below)   |                   |  |
| <b>Continuum of Care /SRO</b>   |                   |  |
| <b>2. Prior Year Federal Grants (unobligated funds only) (list below)</b> |                   |  |
|   |                   |  |

| Financial Resources:<br>Planned Sources and Uses |            |                   |
|--|------------|-------------------|
| Sources  | Planned \$ | Planned Uses      |
|  |            |                   |
|  |            |                   |
| <b>3. Public Housing Dwelling Rental Income</b>  | 128,000    |                   |
|  |            |                   |
|  |            |                   |
| <b>4. Other income</b> (list below)              |            |                   |
| City Interlocal Agreement                        | 27,000     | Salaries          |
| <b>FHLBS</b>                                     | 93,000     | Ownership program |
| <b>4. Non-federal sources</b> (list below)       |            |                   |
|  |            |                   |
|  |            |                   |
|  |            |                   |
| <b>Total resources</b>                           | 1,397,000  |                   |
|  |            |                   |

### **3. PHA Policies Governing Eligibility, Selection, and Admissions**

[24 CFR Part 903.12 (b), 903.7 (b)]

#### **A. Public Housing**

Exemptions: PHAs that do not administer public housing are not required to complete subcomponent 3A.

##### **(1) Eligibility**

a. When does the PHA verify eligibility for admission to public housing? (select all that apply)

- ☐ When families are within a certain number of being offered a unit: (state number)
- ☒ When families are within a certain time of being offered a unit: (state time) one month
- ☐ Other: (describe)

b. Which non-income (screening) factors does the PHA use to establish eligibility for admission to public housing (select all that apply)?

- ☒ Criminal or Drug-related activity
- ☒ Rental history
- ☒ Housekeeping ( to be added in 2004)
- ☐ Other (describe)

c. ☒ Yes ☐ No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?

d. ☒ Yes ☐ No: Does the PHA request criminal records from State law enforcement agencies for screening purposes?

e. ☐ Yes ☒ No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC-authorized source)

##### **(2)Waiting List Organization**

a. Which methods does the PHA plan to use to organize its public housing waiting list (select all that apply)

- ☒ Community-wide list  
☐ Sub-jurisdictional lists  
☐ Site-based waiting lists  
☐ Other (describe)

b. Where may interested persons apply for admission to public housing?

- ☒ PHA main administrative office  
☐ PHA development site management office  
☒ Other (list below) AT project offices such as Mountain View Manor

c. Site-Based Waiting Lists-Previous Year

1. Has the PHA operated one or more site-based waiting lists in the previous year? If yes, complete the following table; if not skip to d.

| Site-Based Waiting Lists                             |                |  |   |  |
|--|----------------|--|---|--|
| Development Information:<br>(Name, number, location) | Date Initiated | Initial mix of Racial, Ethnic or Disability Demographics | Current mix of Racial, Ethnic or Disability Demographics since Initiation of SBWL | Percent change between initial and current mix of Racial, Ethnic, or Disability demographics |
|  |                |  |   |  |
|  |                |  |   |  |
|  |                |  |   |  |
|  |                |  |   |  |

2. What is the number of site based waiting list developments to which families may apply at one time? 1

3. How many unit offers may an applicant turn down before being removed from the site-based waiting list? 3 but not removed from list, just moved to bottom of list

4. ☐ Yes ☒ No: Is the PHA the subject of any pending fair housing complaint by HUD or any court order or settlement agreement? If yes, describe the order, agreement or complaint and describe how use of a site-based waiting list will not violate or be inconsistent with the order, agreement or complaint below:

d. Site-Based Waiting Lists – Coming Year

If the PHA plans to operate one or more site-based waiting lists in the coming year, answer each

of the following questions; if not, skip to subsection **(3) Assignment**

1. How many site-based waiting lists will the PHA operate in the coming year? 1
2. ☐ Yes ☒ No: Are any or all of the PHA's site-based waiting lists new for the upcoming year (that is, they are not part of a previously-HUD-approved site based waiting list plan)?  
If yes, how many lists?
3. ☒ Yes ☐ No: May families be on more than one list simultaneously.  
If yes, how many lists? 2
4. Where can interested persons obtain more information about and sign up to be on the site-based waiting lists (select all that apply)?
  - ☒ PHA main administrative office
  - ☒ All PHA development management offices
  - ☐ Management offices at developments with site-based waiting lists
  - ☐ At the development to which they would like to apply
  - ☐ Other (list below)

### **(3) Assignment**

- a. How many vacant unit choices are applicants ordinarily given before they fall to the bottom of or are removed from the waiting list? (select one)
  - ☐ One
  - ☐ Two
  - ☒ Three or More
- b. ☒ Yes ☐ No: Is this policy consistent across all waiting list types?
- c. If answer to b is no, list variations for any other than the primary public housing waiting list/s for the PHA:

### **(4) Admissions Preferences**

- a. Income targeting:
  - ☒ Yes ☐ No: Does the PHA plan to exceed the federal targeting requirements by targeting more than 40% of all new admissions to public housing to families at or below 30% of median area income?
- b. Transfer policies:  
In what circumstances will transfers take precedence over new admissions? (list below)
  - ☐ Emergencies
  - ☐ Over-housed
  - ☐ Under-housed

- ☐ Medical justification
- ☐ Administrative reasons determined by the PHA (e.g., to permit modernization work)
- ☐ Resident choice: (state circumstances below)
- ☐ Other: (list below)

c. Preferences

1. ☒ Yes ☐ No: Has the PHA established preferences for admission to public housing (other than date and time of application)? (If “no” is selected, skip to subsection **(5) Occupancy**)
2. Which of the following admission preferences does the PHA plan to employ in the coming year? (select all that apply from either former Federal preferences or other preferences)

Former Federal preferences:

- ☐ Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)
- ☐ Victims of domestic violence
- ☒ Substandard housing
- ☒ Homelessness
- ☒ High rent burden (rent is > 50 percent of income)

Other preferences: (select below)

- ☒ Working families and those unable to work because of age or disability
- ☒ Veterans and veterans' families
- ☒ Residents who live and/or work in the jurisdiction
- ☒ Those enrolled currently in educational, training, or upward mobility programs
- ☒ Households that contribute to meeting income goals (broad range of incomes)
- ☐ Households that contribute to meeting income requirements (targeting)
- ☐ Those previously enrolled in educational, training, or upward mobility programs
- ☒ Victims of reprisals or hate crimes
- ☐ Other preference(s) (list below)

3. If the PHA will employ admissions preferences, please prioritize by placing a “1” in the space that represents your first priority, a “2” in the box representing your second priority, and so on. If you give equal weight to one or more of these choices (either through an absolute hierarchy or through a point system), place the same number next to each. That means you can use “1” more than once, “2” more than once, etc.

- ☒ 1 Date and Time

Former Federal preferences:

- ☐ Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)
- ☐ Victims of domestic violence
- ☒ 1 Substandard housing



- ☒ 1 Homelessness
- ☒ 1 High rent burden

Other preferences (select all that apply)

- ☒ 1 Working families and those unable to work because of age or disability
- ☒ 2 Veterans and veterans' families
- ☒ 1 Residents who live and/or work in the jurisdiction
- ☒ 2 Those enrolled currently in educational, training, or upward mobility programs
- ☒ 2 Households that contribute to meeting income goals (broad range of incomes)
- ☐ Households that contribute to meeting income requirements (targeting)
- ☐ Those previously enrolled in educational, training, or upward mobility programs
- ☒ 1 Victims of reprisals or hate crimes

4. Relationship of preferences to income targeting requirements:

- ☐ The PHA applies preferences within income tiers
- ☒ Not applicable: the pool of applicant families ensures that the PHA will meet income targeting requirements

#### **(5) Occupancy**

a. What reference materials can applicants and residents use to obtain information about the rules of occupancy of public housing (select all that apply)

- ☒ The PHA-resident lease
- ☒ The PHA's Admissions and (Continued) Occupancy policy
- ☒ PHA briefing seminars or written materials
- ☒ Other source (list) Resident Handbook and handouts

b. How often must residents notify the PHA of changes in family composition? (select all that apply)

- ☐ At an annual reexamination and lease renewal
- ☒ Any time family composition changes
- ☒ At family request for revision
- ☐ Other (list)

#### **(6) Deconcentration and Income Mixing**

a. ☐ Yes ☒ No: Does the PHA have any general occupancy (family) public housing developments covered by the deconcentration rule? If no, this section is complete. If yes, continue to the next question.

b. ☐ Yes ☐ No: Do any of these covered developments have average incomes above or below 85% to 115% of the average incomes of all such developments? If no, this section is complete. If yes, list these developments on the following table:

|  |
|--|
| <b>Deconcentration Policy for Covered Developments</b> |
|--|

| Development Name | Number of Units | Explanation (if any) [see step 4 at §903.2(c)(1)(iv)] | Deconcentration policy (if no explanation) [see step 5 at §903.2(c)(1)(v)] |
|------------------|-----------------|---|--|
|                  |                 |   |  |
|                  |                 |   |  |
|                  |                 |   |  |

## B. Section 8

Exemptions: PHAs that do not administer section 8 are not required to complete sub-component 3B.

**Unless otherwise specified, all questions in this section apply only to the tenant-based section 8 assistance program (vouchers, and until completely merged into the voucher program, certificates).**

### (1) Eligibility

a. What is the extent of screening conducted by the PHA? (select all that apply)

- ☐ Criminal or drug-related activity only to the extent required by law or regulation  
☐ Criminal and drug-related activity, more extensively than required by law or regulation  
☐ More general screening than criminal and drug-related activity (list factors):  
☐ Other (list below)

b. ☐ Yes ☐ No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?

c. ☐ Yes ☐ No: Does the PHA request criminal records from State law enforcement agencies for screening purposes?

d. ☐ Yes ☐ No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC-authorized source)

e. Indicate what kinds of information you share with prospective landlords? (select all that apply)

- ☐ Criminal or drug-related activity  
☐ Other (describe below)

### (2) Waiting List Organization

a. With which of the following program waiting lists is the section 8 tenant-based assistance waiting list merged? (select all that apply)

- ☐ None  
☐ Federal public housing  
☐ Federal moderate rehabilitation  
☐ Federal project-based certificate program  
☐ Other federal or local program (list below)

b. Where may interested persons apply for admission to section 8 tenant-based assistance? (select all that apply)

- ☐ PHA main administrative office

☐ Other (list below)

**(3) Search Time**

a. ☐ Yes ☐ No: Does the PHA give extensions on standard 60-day period to search for a unit?

If yes, state circumstances below:

**(4) Admissions Preferences**

a. Income targeting

☐ Yes ☐ No: Does the PHA plan to exceed the federal targeting requirements by targeting more than 75% of all new admissions to the section 8 program to families at or below 30% of median area income?

b. Preferences

1. ☐ Yes ☐ No: Has the PHA established preferences for admission to section 8 tenant-based assistance? (other than date and time of application) (if no, skip to subcomponent **(5) Special purpose section 8 assistance programs**)

2. Which of the following admission preferences does the PHA plan to employ in the coming year? (select all that apply from either former Federal preferences or other preferences)

Former Federal preferences

- ☐ Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)
- ☐ Victims of domestic violence
- ☐ Substandard housing
- ☐ Homelessness
- ☐ High rent burden (rent is > 50 percent of income)

Other preferences (select all that apply)

- ☐ Working families and those unable to work because of age or disability
- ☐ Veterans and veterans' families
- ☐ Residents who live and/or work in your jurisdiction
- ☐ Those enrolled currently in educational, training, or upward mobility programs
- ☐ Households that contribute to meeting income goals (broad range of incomes)
- ☐ Households that contribute to meeting income requirements (targeting)
- ☐ Those previously enrolled in educational, training, or upward mobility programs
- ☐ Victims of reprisals or hate crimes
- ☐ Other preference(s) (list below)

3. If the PHA will employ admissions preferences, please prioritize by placing a "1" in the space that represents your first priority, a "2" in the box representing your second priority, and so on. If you give equal weight to one or more of these choices (either through an absolute hierarchy or through a point system), place the same number next to each. That means you can use "1" more

than once, “2” more than once, etc.

☐ Date and Time

Former Federal preferences:

- ☐ Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)
- ☐ Victims of domestic violence
- ☐ Substandard housing
- ☐ Homelessness
- ☐ High rent burden

Other preferences (select all that apply)

- ☐ Working families and those unable to work because of age or disability
- ☐ Veterans and veterans’ families
- ☐ Residents who live and/or work in your jurisdiction
- ☐ Those enrolled currently in educational, training, or upward mobility programs
- ☐ Households that contribute to meeting income goals (broad range of incomes)
- ☐ Households that contribute to meeting income requirements (targeting)
- ☐ Those previously enrolled in educational, training, or upward mobility programs
- ☐ Victims of reprisals or hate crimes
- ☐ Other preference(s) (list below)

4. Among applicants on the waiting list with equal preference status, how are applicants selected? (select one)

- ☐ Date and time of application
- ☐ Drawing (lottery) or other random choice technique

5. If the PHA plans to employ preferences for “residents who live and/or work in the jurisdiction” (select one)

- ☐ This preference has previously been reviewed and approved by HUD
- ☐ The PHA requests approval for this preference through this PHA Plan

6. Relationship of preferences to income targeting requirements: (select one)

- ☐ The PHA applies preferences within income tiers
- ☐ Not applicable: the pool of applicant families ensures that the PHA will meet income targeting requirements

#### **(5) Special Purpose Section 8 Assistance Programs**

a. In which documents or other reference materials are the policies governing eligibility, selection, and admissions to any special-purpose section 8 program administered by the PHA contained? (select all that apply)

- ☐ The Section 8 Administrative Plan
- ☐ Briefing sessions and written materials

☐ Other (list below)

b. How does the PHA announce the availability of any special-purpose section 8 programs to the public?

☐ Through published notices

☐ Other (list below)

#### **4. PHA Rent Determination Policies**

[24 CFR Part 903.12(b), 903.7(d)]

##### **A. Public Housing**

Exemptions: PHAs that do not administer public housing are not required to complete sub-component 4A.

##### **(1) Income Based Rent Policies**

Describe the PHA's income based rent setting policy/ies for public housing using, including discretionary (that is, not required by statute or regulation) income disregards and exclusions, in the appropriate spaces below.

a. Use of discretionary policies: (select one of the following two)

☒ The PHA will not employ any discretionary rent-setting policies for income-based rent in public housing. Income-based rents are set at the higher of 30% of adjusted monthly income, 10% of unadjusted monthly income, the welfare rent, or minimum rent (less HUD mandatory deductions and exclusions). (If selected, skip to sub-component (2))

☐ The PHA employs discretionary policies for determining income-based rent (If selected, continue to question b.)

b. Minimum Rent

1. What amount best reflects the PHA's minimum rent? (select one)

- ☐ \$0  
☐ \$1-\$25  
☒ \$26-\$50

2. ☐ Yes ☒ No: Has the PHA adopted any discretionary minimum rent hardship exemption policies?

3. If yes to question 2, list these policies below:

c. Rents set at less than 30% of adjusted income

1. ☒ Yes ☒ No: Does the PHA plan to charge rents at a fixed amount or percentage less than 30% of adjusted income?
2. If yes to above, list the amounts or percentages charged and the circumstances under which these will be used below: The percentage drops below 30% of adjusted income only in the case of a household hardship.

d. Which of the discretionary (optional) deductions and/or exclusions policies does the PHA plan to employ (select all that apply)

- ☒ For the earned income of a previously unemployed household member
- ☐ For increases in earned income
- ☐ Fixed amount (other than general rent-setting policy)

If yes, state amount/s and circumstances below:

- ☐ Fixed percentage (other than general rent-setting policy)
- If yes, state percentage/s and circumstances below:

- ☐ For household heads
- ☐ For other family members
- ☐ For transportation expenses
- ☐ For the non-reimbursed medical expenses of non-disabled or non-elderly families
- ☐ Other (describe below)

e. Ceiling rents

1. Do you have ceiling rents? (rents set at a level lower than 30% of adjusted income) (select one)

- ☒ Yes for all developments
- ☐ Yes but only for some developments
- ☐ No

2. For which kinds of developments are ceiling rents in place? (select all that apply)

- ☒ For all developments
- ☐ For all general occupancy developments (not elderly or disabled or elderly only)
- ☐ For specified general occupancy developments
- ☐ For certain parts of developments; e.g., the high-rise portion
- ☐ For certain size units; e.g., larger bedroom sizes
- ☐ Other (list below)

3. Select the space or spaces that best describe how you arrive at ceiling rents (select all that apply)

- ☐ Market comparability study

- ☒ Fair market rents (FMR)
- ☐ 95<sup>th</sup> percentile rents
- ☐ 75 percent of operating costs
- ☐ 100 percent of operating costs for general occupancy (family) developments
- ☐ Operating costs plus debt service
- ☐ The "rental value" of the unit
- ☐ Other (list below)

f. Rent re-determinations:

1. Between income reexaminations, how often must tenants report changes in income or family composition to the PHA such that the changes result in an adjustment to rent? (select all that apply)

- ☐ Never
- ☒ At family option
- ☐ Any time the family experiences an income increase
- ☒ Any time a family experiences an income increase above a threshold amount or percentage: (if selected, specify threshold) \_\_change of income of \$50 or more\_\_
- ☐ Other (list below)

g. ☐ Yes ☒ No: Does the PHA plan to implement individual savings accounts for residents (ISAs) as an alternative to the required 12 month disallowance of earned income and phasing in of rent increases in the next year?

## **(2) Flat Rents**

a. In setting the market-based flat rents, what sources of information did the PHA use to establish comparability? (select all that apply.)

- ☐ The section 8 rent reasonableness study of comparable housing
- ☐ Survey of rents listed in local newspaper
- ☐ Survey of similar unassisted units in the neighborhood
- ☒ Other (list/describe below) Fair Market Rent

## **B. Section 8 Tenant-Based Assistance**

Exemptions: PHAs that do not administer Section 8 tenant-based assistance are not required to complete sub-component 4B. **Unless otherwise specified, all questions in this section apply only to the tenant-based section 8 assistance program (vouchers, and until completely merged into the voucher program, certificates).**

### **(1) Payment Standards**

Describe the voucher payment standards and policies.

a. What is the PHA's payment standard? (select the category that best describes your standard)

- ☐ At or above 90% but below 100% of FMR
- ☐ 100% of FMR
- ☐ Above 100% but at or below 110% of FMR

☐ Above 110% of FMR (if HUD approved; describe circumstances below)

b. If the payment standard is lower than FMR, why has the PHA selected this standard? (select all that apply)

- ☐ FMRs are adequate to ensure success among assisted families in the PHA's segment of the FMR area
- ☐ The PHA has chosen to serve additional families by lowering the payment standard
- ☐ Reflects market or submarket
- ☐ Other (list below)

c. If the payment standard is higher than FMR, why has the PHA chosen this level? (select all that apply)

- ☐ FMRs are not adequate to ensure success among assisted families in the PHA's segment of the FMR area
- ☐ Reflects market or submarket
- ☐ To increase housing options for families
- ☐ Other (list below)

d. How often are payment standards reevaluated for adequacy? (select one)

- ☐ Annually
- ☐ Other (list below)

e. What factors will the PHA consider in its assessment of the adequacy of its payment standard? (select all that apply)

- ☐ Success rates of assisted families
- ☐ Rent burdens of assisted families
- ☐ Other (list below)

## **(2) Minimum Rent**

a. What amount best reflects the PHA's minimum rent? (select one)

- ☐ \$0
- ☐ \$1-\$25
- ☐ \$26-\$50

b. ☐ Yes ☐ No: Has the PHA adopted any discretionary minimum rent hardship exemption policies? (if yes, list below)

## **5. Capital Improvement Needs**

[24 CFR Part 903.12(b), 903.7 (g)]

Exemptions from Component 5: Section 8 only PHAs are not required to complete this component and may skip to Component 6.



## A. Capital Fund Activities

Exemptions from sub-component 5A: PHAs that will not participate in the Capital Fund Program may skip to component 5B. All other PHAs must complete 5A as instructed.

### (1) Capital Fund Program

- a. ☒ Yes ☐ No Does the PHA plan to participate in the Capital Fund Program in the upcoming year? If yes, complete items 12 and 13 of this template (Capital Fund Program tables). If no, skip to B.
- b. ☐ Yes ☒ No: Does the PHA propose to use any portion of its CFP funds to repay debt incurred to finance capital improvements? If so, the PHA must identify in its annual and 5-year capital plans the development(s) where such improvements will be made and show both how the proceeds of the financing will be used and the amount of the annual payments required to service the debt. (Note that separate HUD approval is required for such financing activities.).

## B. HOPE VI and Public Housing Development and Replacement Activities (Non-Capital Fund)

Applicability of sub-component 5B: All PHAs administering public housing. Identify any approved HOPE VI and/or public housing development or replacement activities not described in the Capital Fund Program Annual Statement.

### (1) Hope VI Revitalization

- a. ☐ Yes ☒ No: Has the PHA received a HOPE VI revitalization grant? (if no, skip to next component; if yes, provide responses to questions on chart below for each grant, copying and completing as many times as necessary)
- b. Status of HOPE VI revitalization grant (complete one set of questions for each grant)  
Development name:  
Development (project) number:  
Status of grant: (select the statement that best describes the current status)  
☐ Revitalization Plan under development  
☐ Revitalization Plan submitted, pending approval  
☐ Revitalization Plan approved  
☐ Activities pursuant to an approved Revitalization Plan underway
- c. ☐ Yes ☐ No: Does the PHA plan to apply for a HOPE VI Revitalization grant in the Plan year? If yes, list development name/s below:
- d. ☐ Yes ☒ No: Will the PHA be engaging in any mixed-finance development activities for

public housing in the Plan year? If yes, list developments or activities below:

- e. ☐ Yes ☒ No: Will the PHA be conducting any other public housing development or replacement activities not discussed in the Capital Fund Program Annual Statement? If yes, list developments or activities below:

## **6. Demolition and Disposition**

[24 CFR Part 903.12(b), 903.7 (h)]

Applicability of component 6: Section 8 only PHAs are not required to complete this section.

- a. ☐ Yes ☒ No: Does the PHA plan to conduct any demolition or disposition activities (pursuant to section 18 or 24 (Hope VI) of the U.S. Housing Act of 1937 (42 U.S.C. 1437p) or Section 202/Section 33 (Mandatory Conversion) in the plan Fiscal Year? (If “No”, skip to component 7; if “yes”, complete one activity description for each development on the following chart.)

| <b>Demolition/Disposition Activity Description</b>  |
|---|
| 1a. Development name: Mountain View Manor<br>1b. Development (project) number: MT015  |
| 2. Activity type: Demolition <input type="checkbox"/><br>Disposition <input type="checkbox"/>   |
| 3. Application status (select one)<br>Approved <input type="checkbox"/><br>Submitted, pending approval <input type="checkbox"/><br>Planned application <input type="checkbox"/> |
| 4. Date application approved, submitted, or planned for submission: (DD/MM/YY)  |
| 5. Number of units affected:  |
| 6. Coverage of action (select one)<br><input type="checkbox"/> Part of the development<br><input type="checkbox"/> Total development  |
| 7. Timeline for activity:<br>a. Actual or projected start date of activity:<br>b. Projected end date of activity:   |

## **7. Section 8 Tenant Based Assistance--Section 8(y) Homeownership Program**

[24 CFR Part 903.12(b), 903.7(k)(1)(i)]

- (1) ☐ Yes ☐ No: Does the PHA plan to administer a Section 8 Homeownership program pursuant to Section 8(y) of the U.S.H.A. of 1937, as implemented by 24 CFR part 982 ? (If “No”, skip to the next component; if “yes”, complete each program description below (copy and complete questions for each program identified.)

### **(2) Program Description**

- a. Size of Program

☐ Yes ☒ No: Will the PHA limit the number of families participating in the Section 8 homeownership option?

If the answer to the question above was yes, what is the maximum number of participants this fiscal year? \_\_\_\_

b. PHA established eligibility criteria

☐ Yes ☐ No: Will the PHA's program have eligibility criteria for participation in its Section 8 Homeownership Option program in addition to HUD criteria? If yes, list criteria below:

c. What actions will the PHA undertake to implement the program this year (list)?

**(3) Capacity of the PHA to Administer a Section 8 Homeownership Program**

The PHA has demonstrated its capacity to administer the program by (select all that apply):

- a. ☐ Establishing a minimum homeowner downpayment requirement of at least 3 percent of purchase price and requiring that at least 1 percent of the purchase price comes from the family's resources.
- b. ☐ Requiring that financing for purchase of a home under its Section 8 homeownership will be provided, insured or guaranteed by the state or Federal government; comply with secondary mortgage market underwriting requirements; or comply with generally accepted private sector underwriting standards.
- c. ☐ Partnering with a qualified agency or agencies to administer the program (list name(s) and years of experience below).
- d. ☐ Demonstrating that it has other relevant experience (list experience below).

**8. Civil Rights Certifications**

[24 CFR Part 903.12 (b), 903.7 (o)]

Civil rights certifications are included in the *PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations: Board Resolution to Accompany the Standard Annual, Standard Five-Year, and Streamlined Five-Year/Annual Plans*, which is submitted to the Field Office in hard copy—see Table of Contents.

**9. Additional Information**

[24 CFR Part 903.12 (b), 903.7 (r)]

**A. PHA Progress in Meeting the Mission and Goals Described in the 5-Year Plan**

Goal #1: Expand the supply of assisted housing. In 2003, the Whitefish Housing Authority attempted to purchase a preservation project (16 rentals) but was unsuccessful due to the fast paced housing market and high cost of land in Whitefish. The Whitefish Housing Authority is in

the process of creating its first home ownership opportunities for low income households and has applied to the HOME program to fund the construction of the first five units. Progress has been made in this area and from the progress it is expected that new housing opportunities will be more easily facilitated.

Goal #2: Improve the quality of assisted housing. The PHA has maintained a “high performer” rating for the last three years. Tenant satisfaction has increased due to the creation of a transportation voucher system and the modernization of the Mountain View Manor.

Modernization improvements include new carpet in community areas and hallways, creation of an exercise room, tenant computer lab, installation of fire sprinkler system, replacement of old sidewalk with ADA ramp, additional parking spaces, additional tenant gardens, easement for a bike path, installation of a public telephone in lobby, tenant cable in community room, new window shades for abatement of heat, improved air circulation in hallways and community space, painting of laundry rooms, and the procurement of soda and snack machines.

Goal #3: Increase assisted housing choices: The Whitefish Housing Authority supported the application for tax credits by a for profit developer for the construction of 30 rental units for the elderly, 30 rental units for multifamily in Whitefish, and 10 apartment units on Big Mountain. The Whitefish Housing Authority has also supported the adoption of an inclusionary zoning ordinance in Whitefish for the 10% inclusion of affordable units in all new subdivisions over six units.

Goal #4: Provide an improved living environment. Please see goal #2

Goal #5: Promote self-sufficiency and asset development of assisted households. More work is needed in this area and is planned for the next five years. Plans include the creation of homebuyer workshops, financial education courses, networking with the local job service.

Accomplishments include the creation of a tenant hall monitor for rent reduction, creation of supportive services for pet care, transportation (taxi vouchers), and a monthly blood pressure clinic. Services needed in the next five years will include services for those with disabilities in the area of job counseling, home/ apartment upkeep, and counseling services.

Goal #5: Ensure Equal Opportunity in Housing. The Whitefish Housing Authority has created visitor parking and increased handicapped parking. One sidewalk and entrance to the building has been replaced with an ADA ramp and the second walk is scheduled for change in the summer of 2004.

## **B. Criteria for Substantial Deviations and Significant Amendments**

### **(1) Amendment and Deviation Definitions**

24 CFR Part 903.7(r)

PHAs are required to define and adopt their own standards of substantial deviation from the 5-year Plan and Significant Amendment to the Annual Plan. The definition of significant amendment is important because it defines when the PHA will subject a change to the policies or activities described in the Annual Plan to full public hearing and HUD review before implementation.

**a. Substantial Deviation from the 5-Year Plan:** A substantial deviation shall be defined as a use of funds for a project or need which is not listed on the 5-year Plan or any annual plan and which will cost more than 70% of the most current CFP grant contract amount.

**b. Significant Amendment or Modification to the Annual Plan:** A significant amendment or modification to the Annual Plan shall be defined as the use of funds for a project or need which is not listed in the Five Year Plan, the current Annual Plan or any previous year's Annual Plan which has not been completed and which will require the spending of more than 70% of any current CFP grant awards.

### **C. Other Information**

[24 CFR Part 903.13, 903.15]

#### **(1) Resident Advisory Board Recommendations**

a. ☒ Yes ☐ No: Did the PHA receive any comments on the PHA Plan from the Resident Advisory Board/s?

If yes, provide the comments below:

b. In what manner did the PHA address those comments? (select all that apply)

☐ Considered comments, but determined that no changes to the PHA Plan were necessary.

☒ The PHA changed portions of the PHA Plan in response to comments  
List changes below:

The cost of rehabilitating an apartment with a possible heat problem was transferred to the operating budget and replaced the project with tenant requested services and needs including; increased transportation vouchers, more emphasis on air conditioning and conservation window coverings, and purchase of new carts to aid tenants haul their groceries.

☐ Other: (list below)

#### **(2) Resident Membership on PHA Governing Board**

The governing board of each PHA is required to have at least one member who is directly assisted by the PHA, unless the PHA meets certain exemption criteria. Regulations governing the resident board member are found at 24 CFR Part 964, Subpart E.

a. Does the PHA governing board include at least one member who is directly assisted by the PHA this year?

☒ Yes ☐ No:

If yes, complete the following:

Name of Resident Member of the PHA Governing Board:

Felicia Stimson  
Robert Taylor

Method of Selection:

☒ Appointment

**The term of appointment is (include the date term expires): 2 years,  
expires December 31<sup>st</sup>, 2005**

☐ Election by Residents (if checked, complete next section--Description of Resident Election Process)

**Description of Resident Election Process**

Nomination of candidates for place on the ballot: (select all that apply)

- ☐ Candidates were nominated by resident and assisted family organizations  
☐ Candidates could be nominated by any adult recipient of PHA assistance  
☒ Self-nomination: Candidates registered with the PHA and requested a place on ballot  
☐ Other: (describe)

Eligible candidates: (select one)

- ☒ Any recipient of PHA assistance  
☐ Any head of household receiving PHA assistance  
☐ Any adult recipient of PHA assistance  
☐ Any adult member of a resident or assisted family organization  
☐ Other (list)

Eligible voters: (select all that apply)

- ☐ All adult recipients of PHA assistance (public housing and section 8 tenant-based assistance)  
☒ Representatives of all PHA resident and assisted family organizations  
☐ Other (list)

b. If the PHA governing board does not have at least one member who is directly assisted by the PHA, why not?

- ☐ The PHA is located in a State that requires the members of a governing board to be salaried and serve on a full time basis  
☐ The PHA has less than 300 public housing units, has provided reasonable notice to the resident advisory board of the opportunity to serve on the governing board, and has not been notified by any resident of their interest to participate in the Board.  
☐ Other (explain):

Date of next term expiration of a governing board member: December 31<sup>st</sup>, 2005

Name and title of appointing official(s) for governing board (indicate appointing official for the next available position):

Mayor Andy Feury, PO Box 158 Whitefish, MT 59937 (406) 863-2400

**(3) PHA Statement of Consistency with the Consolidated Plan**

[24 CFR Part 903.15]

For each applicable Consolidated Plan, make the following statement (copy questions as many times as necessary).

**Consolidated Plan jurisdiction: Whitefish City-County Master Plan**

a. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction: (select all that apply):

- ☒ The PHA has based its statement of needs of families on its waiting list on the needs expressed in the Consolidated Plan/s.
- ☒ The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.
- ☒ The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.
- ☒ Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)

Policies:

- 5.1 Provide an adequate supply of affordable housing to meet the needs of low and moderate income residents.
- 5.15 Provide adequate park lands, pedestrian access and adjacent open space in higher density neighborhoods.
- 5.16 Accommodate the special needs of seniors, children, handicapped persons, and low and moderate income persona in hosing provision and design.
- 5.8 Encourage the infill of existing residential neighborhoods rather than leap-frog or sprawl development beyond the city limits.

- ☒ Other: (list below)

The Whitefish Housing Authority networks with the City of Whitefish in order to better address the housing needs of low and moderate income persons. The City of Whitefish and the Whitefish Housing Authority entered into an Interlocal agreement for the contracting and management of affordable housing programs and services. The Housing Authority offers education to city officials and appears at City Council meetings to aid in the adoption of an inclusionary zoning ordinance giving preference to the construction of housing units affordable to the incomes we serve. The City of Whitefish and the Housing Authority shared the costs of a housing needs assessment which was completed in December 2003.

b. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)

- 1. The City of Whitefish committed \$22,845 to the Housing Authority for the costs of the Housing Needs Assessment and the creation of new affordable housing programs and services.

2. The City will donate \$9,000 for salaries in FYE 6/30/2005
3. The City of Whitefish prioritized its work list in 2002. Affordable housing was top on the list.
4. The City of Whitefish has instructed the Planning Board to come up with a voluntary inclusionary zoning ordinance which would offer trades in City zoning regulations such as set backs in exchange for a 10% inclusion of affordable units in subdivisions over six units.

**(4) (Reserved)**

Use this section to provide any additional information requested by HUD.

**10. Project-Based Voucher Program**

- a. ☐ Yes ☒ No: Does the PHA plan to “project-base” any tenant-based Section 8 vouchers in the coming year? If yes, answer the following questions.
- b. ☐ Yes ☐ No: Are there circumstances indicating that the project basing of the units, rather than tenant-basing of the same amount of assistance is an appropriate option?

If yes, check which circumstances apply:

- ☐ Low utilization rate for vouchers due to lack of suitable rental units
- ☐ Access to neighborhoods outside of high poverty areas
- ☐ Other (describe below:)

- c. Indicate the number of units and general location of units (e.g. eligible census tracts or smaller areas within eligible census tracts):



## 11. List of Supporting Documents Available for Review for Streamlined Five-Year/ Annual PHA Plans

PHAs are to indicate which documents are available for public review by placing a mark in the “Applicable & On Display” column in the appropriate rows. All listed documents must be on display if applicable to the program activities conducted by the PHA.

| List of Supporting Documents Available for Review |   |  |
|---|---|--|
| Applicable & On Display                           | Supporting Document   | Related Plan Component                                       |
| X   | <i>PHA Certifications of Compliance with the PHA Plans and Related Regulations and Board Resolution to Accompany the Standard Annual, Standard Five-Year, and Streamlined Five-Year/Annual Plans.</i>   | Standard 5 Year and Annual Plans; streamlined 5 Year Plans   |
| X   | State/Local Government Certification of Consistency with the Consolidated Plan.   | 5 Year Plans   |
| X   | Fair Housing Documentation Supporting Fair Housing Certifications: Records reflecting that the PHA has examined its programs or proposed programs, identified any impediments to fair housing choice in those programs, addressed or is addressing those impediments in a reasonable fashion in view of the resources available, and worked or is working with local jurisdictions to implement any of the jurisdictions’ initiatives to affirmatively further fair housing that require the PHA’s involvement. | 5 Year and Annual Plans                                      |
| X   | Housing Needs Statement of the Consolidated Plan for the jurisdiction(s) in which the PHA is located and any additional backup data to support statement of housing needs for families on the PHA’s public housing and Section 8 tenant-based waiting lists.  | Annual Plan: Housing Needs                                   |
| X   | Most recent board-approved operating budget for the public housing program  | Annual Plan: Financial Resources                             |
| X   | Public Housing Admissions and (Continued) Occupancy Policy (A&O/ACOP), which includes the Tenant Selection and Assignment Plan [TSAP] and the Site-Based Waiting List Procedure.  | Annual Plan: Eligibility, Selection, and Admissions Policies |
|   | Any policy governing occupancy of Police Officers and Over-Income Tenants in Public Housing. <input type="checkbox"/> Check here if included in the public housing A&O Policy.  | Annual Plan: Eligibility, Selection, and Admissions Policies |
|   | Section 8 Administrative Plan   | Annual Plan: Eligibility, Selection, and Admissions Policies |
| X   | Public housing rent determination policies, including the method for setting public housing flat rents. <input checked="" type="checkbox"/> Check here if included in the public housing A & O Policy.  | Annual Plan: Rent Determination                              |
| X   | Schedule of flat rents offered at each public housing development. <input type="checkbox"/> Check here if included in the public housing A & O Policy.  | Annual Plan: Rent Determination                              |
|   | Section 8 rent determination (payment standard) policies (if included in plan, not necessary as a supporting document) and written analysis of Section 8 payment standard policies. <input type="checkbox"/> Check here if included in Section 8 Administrative Plan.   | Annual Plan: Rent Determination                              |

| List of Supporting Documents Available for Review |   |  |
|---|---|--|
| Applicable & On Display                           | Supporting Document   | Related Plan Component   |
| X   | Public housing management and maintenance policy documents, including policies for the prevention or eradication of pest infestation (including cockroach infestation).   | Annual Plan: Operations and Maintenance  |
| X   | Results of latest Public Housing Assessment System (PHAS) Assessment (or other applicable assessment).  | Annual Plan: Management and Operations   |
| X   | Follow-up Plan to Results of the PHAS Resident Satisfaction Survey (if necessary)   | Annual Plan: Operations and Maintenance and Community Service & Self-Sufficiency |
|   | Results of latest Section 8 Management Assessment System (SEMAP)  | Annual Plan: Management and Operations   |
|   | Any policies governing any Section 8 special housing types<br><input type="checkbox"/> Check here if included in Section 8 Administrative Plan  | Annual Plan: Operations and Maintenance  |
|   | Consortium agreement(s).  | Annual Plan: Agency Identification and Operations/ Management                    |
| X   | Public housing grievance procedures<br><input checked="" type="checkbox"/> Check here if included in the public housing A & O Policy.   | Annual Plan: Grievance Procedures  |
|   | Section 8 informal review and hearing procedures.<br><input type="checkbox"/> Check here if included in Section 8 Administrative Plan.  | Annual Plan: Grievance Procedures  |
| X   | The Capital Fund/Comprehensive Grant Program Annual Statement /Performance and Evaluation Report for any active grant year.   | Annual Plan: Capital Needs   |
| X   | Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grants.   | Annual Plan: Capital Needs   |
|   | Approved HOPE VI applications or, if more recent, approved or submitted HOPE VI Revitalization Plans, or any other approved proposal for development of public housing.   | Annual Plan: Capital Needs   |
|   | Self-evaluation, Needs Assessment and Transition Plan required by regulations implementing Section 504 of the Rehabilitation Act and the Americans with Disabilities Act. See PIH Notice 99-52 (HA).  | Annual Plan: Capital Needs   |
|   | Approved or submitted applications for demolition and/or disposition of public housing.   | Annual Plan: Demolition and Disposition  |
|   | Approved or submitted applications for designation of public housing (Designated Housing Plans).  | Annual Plan: Designation of Public Housing                                       |
|   | Approved or submitted assessments of reasonable revitalization of public housing and approved or submitted conversion plans prepared pursuant to section 202 of the 1996 HUD Appropriations Act, Section 22 of the US Housing Act of 1937, or Section 33 of the US Housing Act of 1937. | Annual Plan: Conversion of Public Housing  |
|   | Documentation for required Initial Assessment and any additional information required by HUD for Voluntary Conversion.  | Annual Plan: Voluntary Conversion of Public Housing                              |
|   | Approved or submitted public housing homeownership programs/plans.  | Annual Plan: Homeownership   |
|   | Policies governing any Section 8 Homeownership program (Section _____ of the Section 8 Administrative Plan)   | Annual Plan: Homeownership   |
|   | Public Housing Community Service Policy/Programs<br><input type="checkbox"/> Check here if included in Public Housing A & O Policy  | Annual Plan: Community Service & Self-Sufficiency                                |
|   | Cooperative agreement between the PHA and the TANF agency and between the PHA and local employment and training service agencies.   | Annual Plan: Community Service & Self-Sufficiency                                |
|   | FSS Action Plan(s) for public housing and/or Section 8.   | Annual Plan: Community Service & Self-Sufficiency                                |
|   | Section 3 documentation required by 24 CFR Part 135, Subpart E for public housing.  | Annual Plan: Community Service & Self-Sufficiency                                |
|   | Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports for public housing.  | Annual Plan: Community Service & Self-Sufficiency                                |

| List of Supporting Documents Available for Review |  |                              |
|---|--|------------------------------|
| Applicable<br>&<br>On Display                     | Supporting Document  | Related Plan Component       |
| X   | Policy on Ownership of Pets in Public Housing Family Developments (as required by regulation at 24 CFR Part 960, Subpart G).<br><input checked="" type="checkbox"/> Check here if included in the public housing A & O Policy. | Pet Policy                   |
| X   | The results of the most recent fiscal year audit of the PHA conducted under the Single Audit Act as implemented by OMB Circular A-133, the results of that audit and the PHA's response to any findings.                       | Annual Plan: Annual Audit    |
|   | Consortium agreement(s), if a consortium administers PHA programs.   | Joint PHA Plan for Consortia |
|   | Consortia Joint PHA Plans ONLY: Certification that consortium agreement is in compliance with 24 CFR Part 943 pursuant to an opinion of counsel on file and available for inspection   | Joint PHA Plan for Consortia |
|   | Other supporting documents (optional). List individually.  | (Specify as needed)          |

## **12. Capital Fund Program and Capital Fund Program Replacement Housing Factor Annual Statement/Performance and Evaluation Report**

| <b>Annual Statement/Performance and Evaluation Report</b>  |   |  |                |                          |  |
|--|---|--|----------------|--------------------------|--|
| <b>Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary</b>   |   |  |                |                          |  |
| <b>PHA Name:</b><br>Whitefish Housing Authority  |   | <b>Grant Type and Number</b><br>Capital Fund Program Grant No:<br>Replacement Housing Factor Grant No: |                |                          | <b>Federal<br/>FY of<br/>Grant: 04</b> |
| <input checked="" type="checkbox"/> <b>Original Annual Statement</b> <input type="checkbox"/> <b>Reserve for Disasters/ Emergencies</b> <input type="checkbox"/> <b>Revised Annual Statement (revision no: )</b><br><input type="checkbox"/> <b>Performance and Evaluation Report for Period Ending:</b> <input type="checkbox"/> <b>Final Performance and Evaluation Report</b> |   |  |                |                          |  |
| <b>Line</b>  | <b>Summary by Development Account</b>                     | <b>Total Estimated Cost</b>  |                | <b>Total Actual Cost</b> |  |
|  |   | <b>Original</b>  | <b>Revised</b> | <b>Obligated</b>         | <b>Expended</b>                        |
| 1  | Total non-CFP Funds                                       |  |                |                          |  |
| 2  | 1406 Operations   | 15,500   |                |                          |  |
| 3  | 1408 Management Improvements                              |  |                |                          |  |
| 4  | 1410 Administration                                       | 5,000  |                |                          |  |
| 5  | 1411 Audit  | 1,000  |                |                          |  |
| 6  | 1415 Liquidated Damages                                   |  |                |                          |  |
| 7  | 1430 Fees and Costs                                       |  |                |                          |  |
| 8  | 1440 Site Acquisition                                     |  |                |                          |  |
| 9  | 1450 Site Improvement                                     | 47,000   |                |                          |  |
| 10   | 1460 Dwelling Structures                                  | 17,500   |                |                          |  |
| 11   | 1465.1 Dwelling Equipment—Nonexpendable                   |  |                |                          |  |
| 12   | 1470 Nondwelling Structures                               |  |                |                          |  |
| 13   | 1475 Nondwelling Equipment                                |  |                |                          |  |
| 14   | 1485 Demolition   |  |                |                          |  |
| 15   | 1490 Replacement Reserve                                  |  |                |                          |  |
| 16   | 1492 Moving to Work Demonstration                         |  |                |                          |  |
| 17   | 1495.1 Relocation Costs                                   |  |                |                          |  |
| 18   | 1499 Development Activities                               |  |                |                          |  |
| 19   | 1501 Collateralization or Debt Service                    |  |                |                          |  |
| 20   | 1502 Contingency  |  |                |                          |  |
| 21   | Amount of Annual Grant: (sum of lines 2 – 20)             | 86,000   |                |                          |  |
| 22   | Amount of line 21 Related to LBP Activities               | 0  |                |                          |  |
| 23   | Amount of line 21 Related to Section 504 compliance       | 25,000   |                |                          |  |
| 24   | Amount of line 21 Related to Security – Soft Costs        |  |                |                          |  |
| 25   | Amount of Line 21 Related to Security – Hard Costs        |  |                |                          |  |
| 26   | Amount of line 21 Related to Energy Conservation Measures | 9000   |                |                          |  |

## **12. Capital Fund Program and Capital Fund Program Replacement Housing Factor Annual Statement/Performance and Evaluation Report**

| <b>Annual Statement/Performance and Evaluation Report</b><br><b>Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)</b><br><b>Part II: Supporting Pages</b> |   |  |          |                         |         |                         |                   |                   |
|---|---|--|----------|-------------------------|---------|-------------------------|-------------------|-------------------|
| PHA Name: Whitefish Housing Authority   |   | <b>Grant Type and Number</b><br>Capital Fund Program Grant No:<br>Replacement Housing Factor Grant No: |          |                         |         | Federal FY of Grant: 04 |                   |                   |
| Development Number<br>Name/HA-Wide<br>Activities  | General Description of Major Work<br>Categories   | Dev. Acct<br>No.   | Quantity | Total Estimated<br>Cost |         | Total Actual Cost       |                   | Status of<br>Work |
|   |   |  |          | Original                | Revised | Funds<br>Obligated      | Funds<br>Expended |                   |
| MT015   | ADA sidewalks and railings, car<br>plugs  | 1450   | 1        | 14,000                  |         |                         |                   |                   |
| MT015   | Air conditioning  | 1450   | 1        | 19,000                  |         |                         |                   |                   |
| MT015   | New ADA furniture   | 1450   | 1        | 3,000                   |         |                         |                   |                   |
| MT015   | Energy conservation, window<br>coverings  | 1460   | 20       | 5,000                   |         |                         |                   |                   |
| MT015   | Replace kitchen hoods   | 1460   | 20       | 10,000                  |         |                         |                   |                   |
| MT015   | Operations (\$500 reserved for tenant<br>transportation vouchers, \$3,000<br>reserved for development of 5-10<br>year maintenance plan) | 1406   | 1        | 15,500                  |         |                         |                   |                   |
| MT015   | Tenant Specialist pay, computer and<br>bookkeeping outside aid  | 1410   | 1        | 5,000                   |         |                         |                   |                   |
| MT015   | New ceiling in downstairs hallway   | 1450   |          | 2,000                   |         |                         |                   |                   |
| MT015   | Create additional office space/ office<br>remodel for ADA compliance  | 1450   |          | 6,000                   |         |                         |                   |                   |
| MT015   | Dining room remodel   | 1450   |          | 3,000                   |         |                         |                   |                   |
| MT015   | Apartment rehab   | 1460   |          | 2,500                   |         |                         |                   |                   |
| MT015   | Audit costs   | 1411   |          | 1,000                   |         |                         |                   |                   |
|   |   |  |          |                         |         |                         |                   |                   |
|   |   |  |          |                         |         |                         |                   |                   |
|   |   |  |          |                         |         |                         |                   |                   |

## **12. Capital Fund Program and Capital Fund Program Replacement Housing Factor Annual Statement/Performance and Evaluation Report**

| <b>Annual Statement/Performance and Evaluation Report</b><br><b>Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)</b><br><b>Part II: Supporting Pages</b> |   |  |          |                         |                         |                    |                   |                   |
|---|---|--|----------|-------------------------|-------------------------|--------------------|-------------------|-------------------|
| PHA Name: Whitefish Housing Authority   |   | <b>Grant Type and Number</b><br>Capital Fund Program Grant No:<br>Replacement Housing Factor Grant No: |          |                         | Federal FY of Grant: 04 |                    |                   |                   |
| Development Number<br>Name/HA-Wide<br>Activities  | General Description of Major Work<br>Categories | Dev. Acct<br>No.   | Quantity | Total Estimated<br>Cost |                         | Total Actual Cost  |                   | Status of<br>Work |
|   |   |  |          | Original                | Revised                 | Funds<br>Obligated | Funds<br>Expended |                   |
|   |   |  |          |                         |                         |                    |                   |                   |
|   |   |  |          |                         |                         |                    |                   |                   |
|   |   |  |          |                         |                         |                    |                   |                   |
|   |   |  |          |                         |                         |                    |                   |                   |
|   |   |  |          |                         |                         |                    |                   |                   |

### **13. Capital Fund Program Five-Year Action Plan**

## Annual Statement/Performance and Evaluation Report

### Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

## Part III: Implementation Schedule

[illegible]

### 13. Capital Fund Program Five-Year Action Plan

| <b>Capital Fund Program Five-Year Action Plan</b> |                  |  |  |   |  |
|---|------------------|--|--|---|--|
| <b>Part I: Summary</b>                            |                  |  |  |   |  |
| PHA Name<br>Whitefish Housing Authority           |                  |  |  | <input checked="" type="checkbox"/> <b>Original 5-Year Plan</b><br><input type="checkbox"/> <b>Revision No:</b> |  |
| Development Number/Name/HA-Wide                   | Year 1           | Work Statement for Year<br>2<br>FFY Grant:<br>PHA FY: 2006 | Work Statement for Year<br>3<br>FFY Grant:<br>PHA FY: 2007 | Work Statement for Year<br>4<br>FFY Grant:<br>PHA FY: 2008  | Work Statement for Year<br>5<br>FFY Grant:<br>PHA FY: 2009 |
| <b>MT015</b>                                      | Annual Statement | Redo front entrance  | Tenant computers   | Roof repair   | Boiler update  |
|   |                  | Ground level patios  | More patios  | Apartment lighting  | Alternative energy system                                  |
|   |                  | Covered parking  | ADA door tv room   | Community room carpet   | Lobby carpet   |
|   |                  | Remodel apartments   | Remodel apartments   | Remodel apartments  | Remodel apartments   |
|   |                  | Greenhouse   | New washers  | New dryers  |  |
|   |                  | Office computers   |  |   |  |
|   |                  | Water conservation/toilet change                           | Water conservation/ faucet change                          |   |  |
|   |                  | Operating costs  | Operating costs  | Operating costs   | Operating costs  |
|   |                  | Community room entertainment system                        |  |   |  |
|   |                  |  |  |   |  |
|   |                  |  |  |   |  |
| CFP Funds Listed for 5-year planning              |                  |  |  |   |  |
|   |                  |  |  |   |  |
| Replacement Housing Factor Funds                  |                  |  |  |   |  |



[illegible]

### **13. Capital Fund Program Five-Year Action Plan**

|                          |  |  |          |  |  |          |
|--------------------------|--|--|----------|--|--|----------|
|                          |  |  |          |  |  |          |
| Total CFP Estimated Cost |  |  | \$90,000 |  |  | \$42,000 |

**Capital Fund Program Five-Year Action Plan**  
**Part II: Supporting Pages—Work Activities**

[illegible]

### **13. Capital Fund Program Five-Year Action Plan**

|                          |          |  |  |          |
|--------------------------|----------|--|--|----------|
| Total CFP Estimated Cost | \$64,000 |  |  | \$65,000 |
|--------------------------|----------|--|--|----------|